



WhatsApp Integration with Webex Connect User Guide

First Published: November 2024

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Overview

This guide is intended to help set up a WhatsApp Business account (WABA) and phone number and integrate it with Webex Connect to interact with Contact Center agents using both the mobile or desktop application and the web interface of the WhatsApp application.

Prerequisites

You need to provide a mobile number that has not been previously associated with a WhatsApp Business account, nor has it been used in a personal capacity to integrate it with Webex Connect. You can purchase a new number from your Telco (Telecom service provider) or request the Webex Connect Support team to purchase one on your behalf and provision that for the WhatsApp Business account you intend to integrate with the Webex Connect platform. For the latter, you need to raise a TAC case and the TAC engineer will work with the Webex Connect team to provide the WhatsApp asset using virtual numbers. The Webex Connect support personnel can help you set up the WhatsApp account based on the One-time Password (OTP) received for verification using virtual phone numbers. You can work with TAC and the account manager for the initial provisioning of the asset.

If you have a phone number that has been associated with a WhatsApp account previously, you need to disassociate that and migrate the number to a new account as part of the WhatsApp asset creation. For deleting or disassociating the number from the previous WhatsApp account, see <https://developers.facebook.com/docs/whatsapp/on-premises/get-started/migrate-existing-whatsapp-number-to-a-business-account>

For details on how to request a phone number and additionally to complete the 10DLC process for a US region number, see <https://help.imiconnect.io/docs/wxcc-whatsapp-asset-creation>

This phone number must be active as it is used to receive SMS or voice calls during the verification process.

Setting up WhatsApp Asset to Test CCE Representative Flows

To create a WhatsApp Business Account as part of the WhatsApp asset creation, you must have a meta or Facebook user account that needs to be tagged with the WhatsApp business account.

You need the below details for the asset creation:

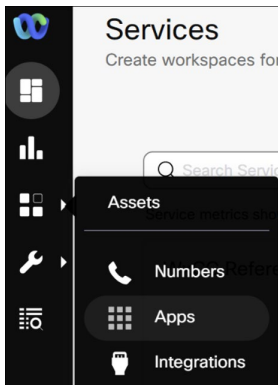
- Business Phone Number
- Company Name
- Representative's Email Address
- Address
- City
- State / Province / Region Country
- Website
- Business number Display Name
- Business Category
- Business Description

Once the WhatsApp asset is created, you can see the asset on Webex Connect and Engage. You can exercise the CCE representative or template flows to see the end-to-end interaction on the Webex engage channel.

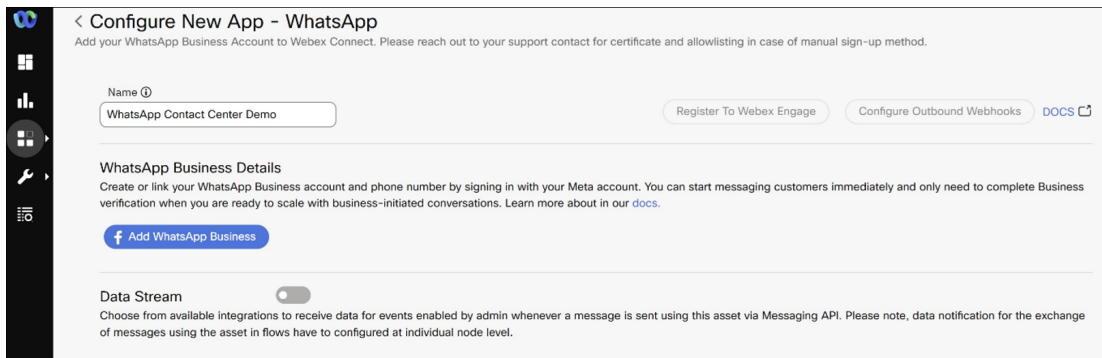
Creating WhatsApp Asset in Webex Connect and Associated WhatsApp Business account

To create a WhatsApp asset in Webex Connect:

1. Log into the Webex Connect tenant and navigate to **Assets > Apps** menu as below:

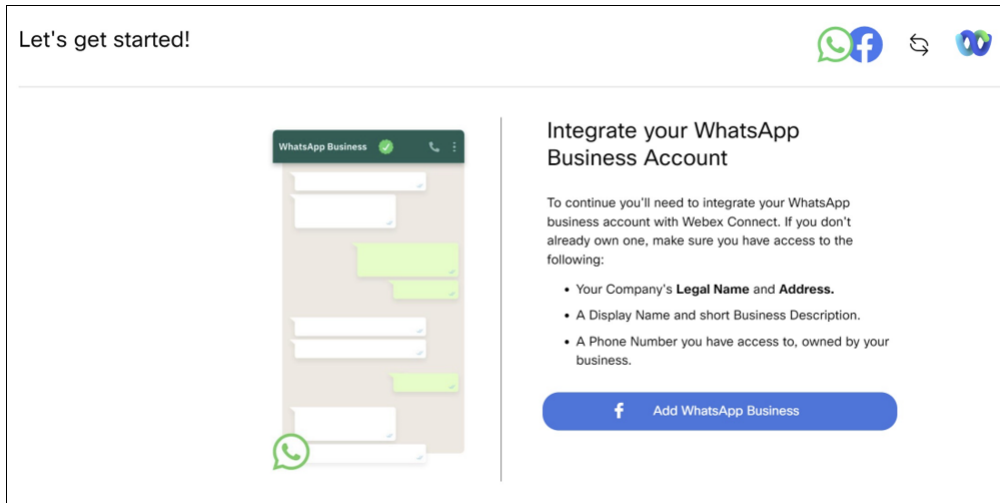


2. Click **Configure New App** and select **WhatsApp** as the type. Provide a name for the asset.



3. Click **Add WhatsApp Business**. A new pop-up appears to start the process of creating the WhatsApp business account and associating it with the asset in Webex Connect. Do not close this wizard until the workflow is completed.

Let's get started!



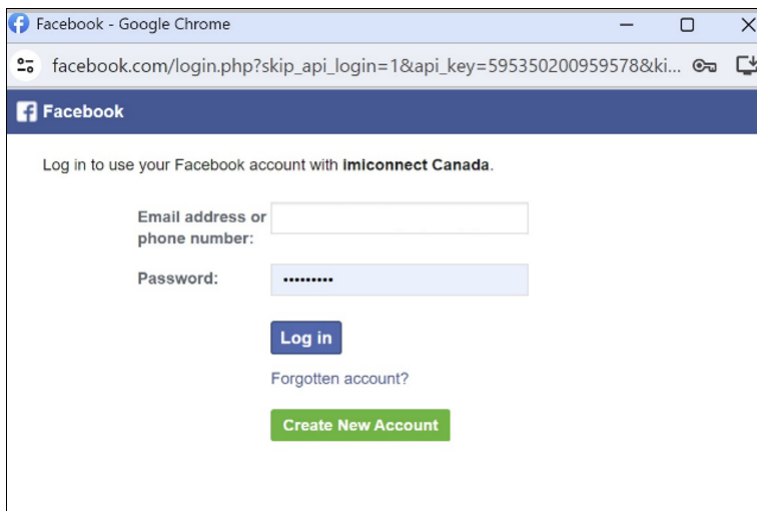
The screenshot shows a user interface for integrating a WhatsApp Business account. On the left, there is a mobile phone icon representing a WhatsApp Business chat interface. On the right, the heading "Integrate your WhatsApp Business Account" is followed by a paragraph of instructions: "To continue you'll need to integrate your WhatsApp business account with Webex Connect. If you don't already own one, make sure you have access to the following:". Below this are three bullet points: "Your Company's **Legal Name** and **Address**.", "A Display Name and short Business Description.", and "A Phone Number you have access to, owned by your business.". At the bottom right, there is a blue button with a Facebook logo and the text "Add WhatsApp Business".

Integrate your WhatsApp Business Account

To continue you'll need to integrate your WhatsApp business account with Webex Connect. If you don't already own one, make sure you have access to the following:

- Your Company's **Legal Name** and **Address**.
- A Display Name and short Business Description.
- A Phone Number you have access to, owned by your business.

[Add WhatsApp Business](#)



The screenshot shows a web browser window with the Facebook login page. The browser's address bar shows the URL "facebook.com/login.php?skip_api_login=1&api_key=595350200959578&ki...". The page header includes the Facebook logo and the text "Facebook". The main content area has the heading "Log in to use your Facebook account with Imlconnect Canada." Below this are two input fields: "Email address or phone number:" and "Password:". The "Password:" field is masked with dots. Below the input fields are three buttons: a blue "Log in" button, a link for "Forgotten account?", and a green "Create New Account" button.

Facebook - Google Chrome

facebook.com/login.php?skip_api_login=1&api_key=595350200959578&ki...

Facebook

Log in to use your Facebook account with **Imlconnect Canada**.

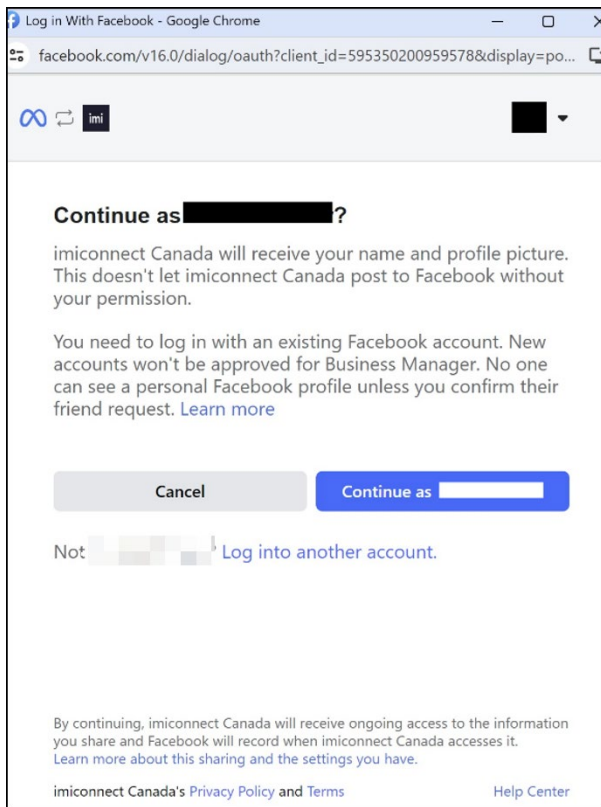
Email address or phone number:

Password:

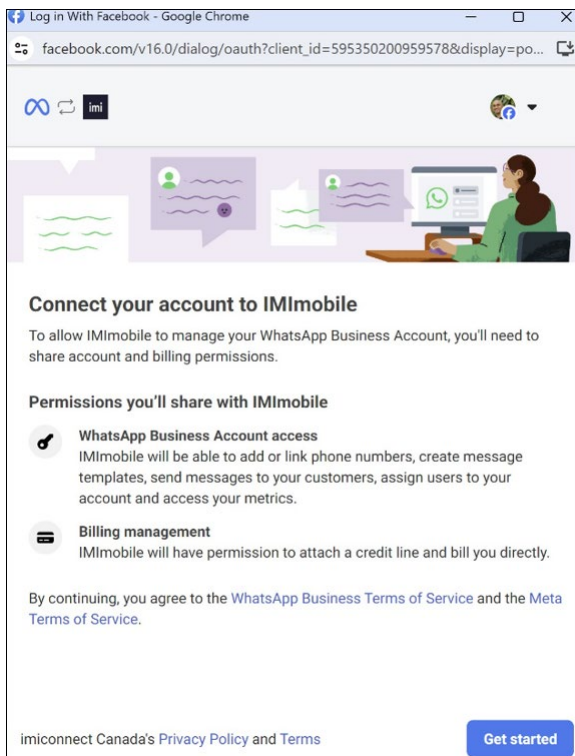
[Log in](#)

[Forgotten account?](#)

[Create New Account](#)



4. You'll be prompted to grant permission to IMImobile application to send and receive messages on behalf of the WhatsApp business account and access billing information.



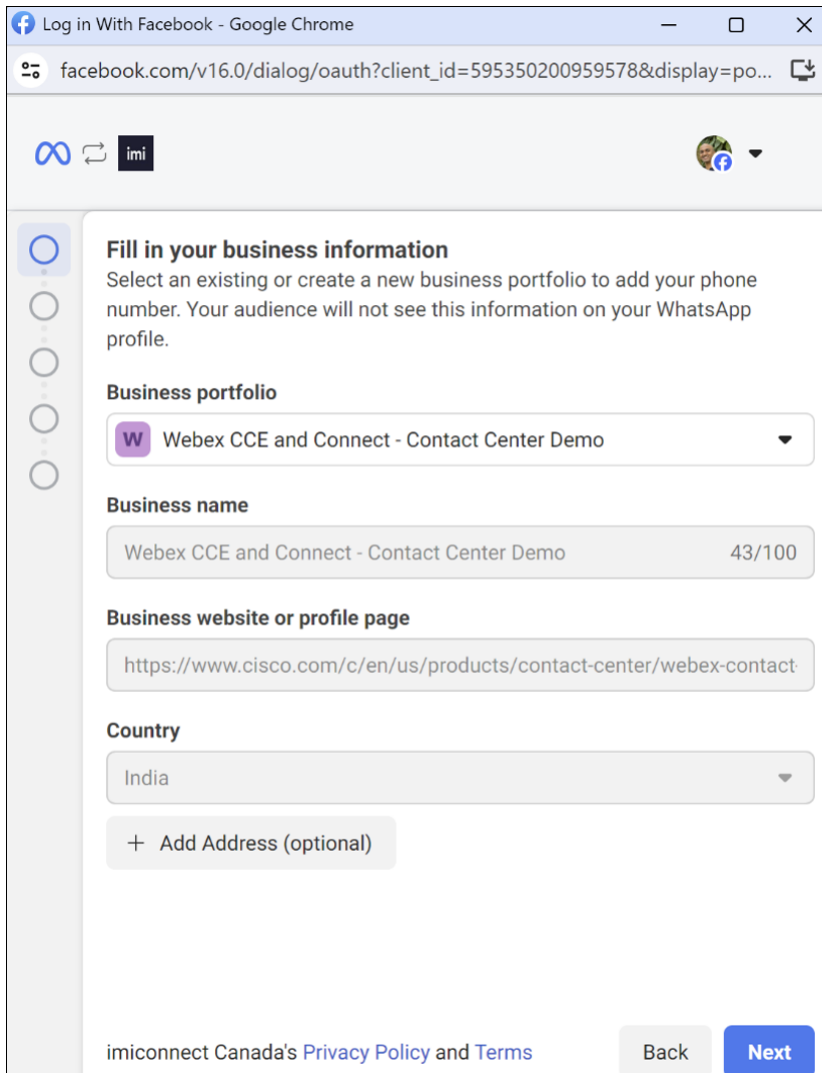
5. Review the permissions that you'll be extending to the application corresponding to Webex Connect (IMI) in your region and then click **Get Started**.

The screenshot shows a web browser window titled "Log in With Facebook - Google Chrome". The address bar contains the URL "facebook.com/v16.0/dialog/oauth?client_id=595350200959578&display=po...". The page content is a form titled "Fill in your business information" with a sub-header "Select an existing or create a new business portfolio to add your phone number. Your audience will not see this information on your WhatsApp profile." The form includes the following fields: "Business name" (text input with value "CCE Contact Center Demo" and character count "23/100"), "Business Email" (text input with subtext "You'll receive an email to verify it."), "Business website or profile page" (text input), "Country" (dropdown menu with "India" selected), and a "+ Add Address (optional)" button. At the bottom, there is a link to "imiconnect Canada's Privacy Policy and Terms", a "Back" button, and a "Next" button.

6. Enter the details to create a Facebook Business portfolio.

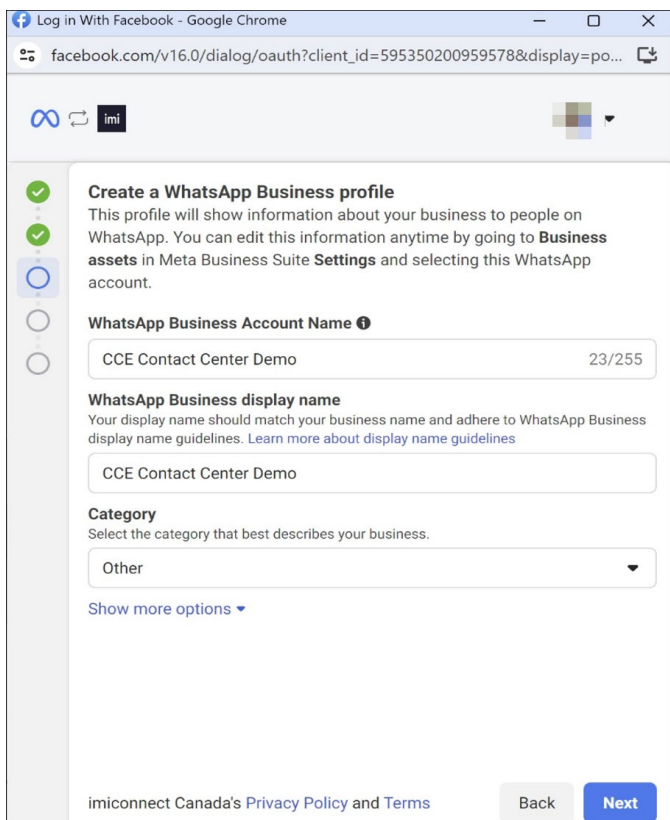
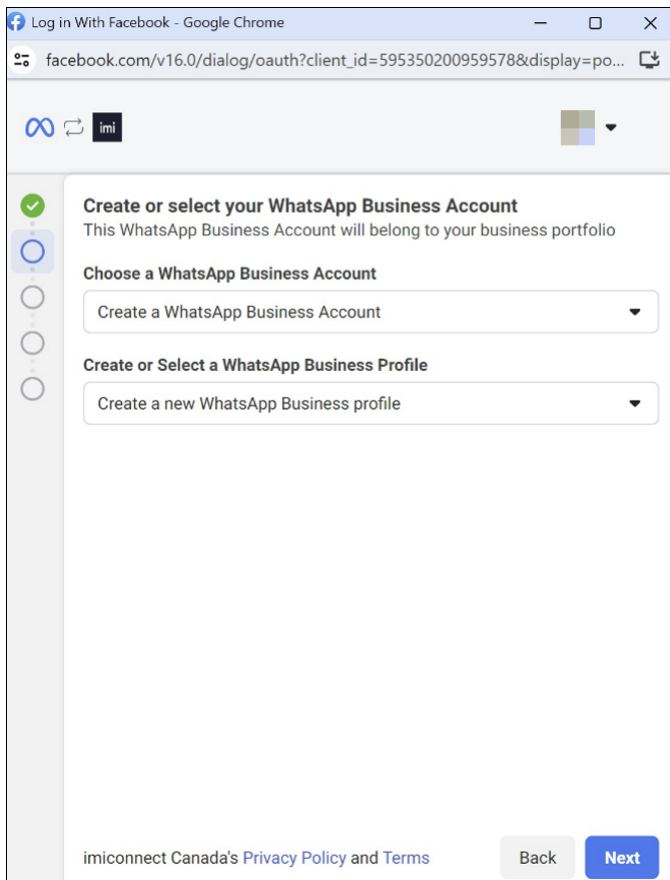
This screenshot is identical to the one above, showing the "Fill in your business information" form in a Chrome browser window. The form fields and their values are the same: "Business name" is "CCE Contact Center Demo", "Business Email" is empty, "Business website or profile page" is empty, "Country" is "India", and there is an "+ Add Address (optional)" button. The "Next" button is highlighted in blue.

If you already have one, you can select it from the drop-down menu.

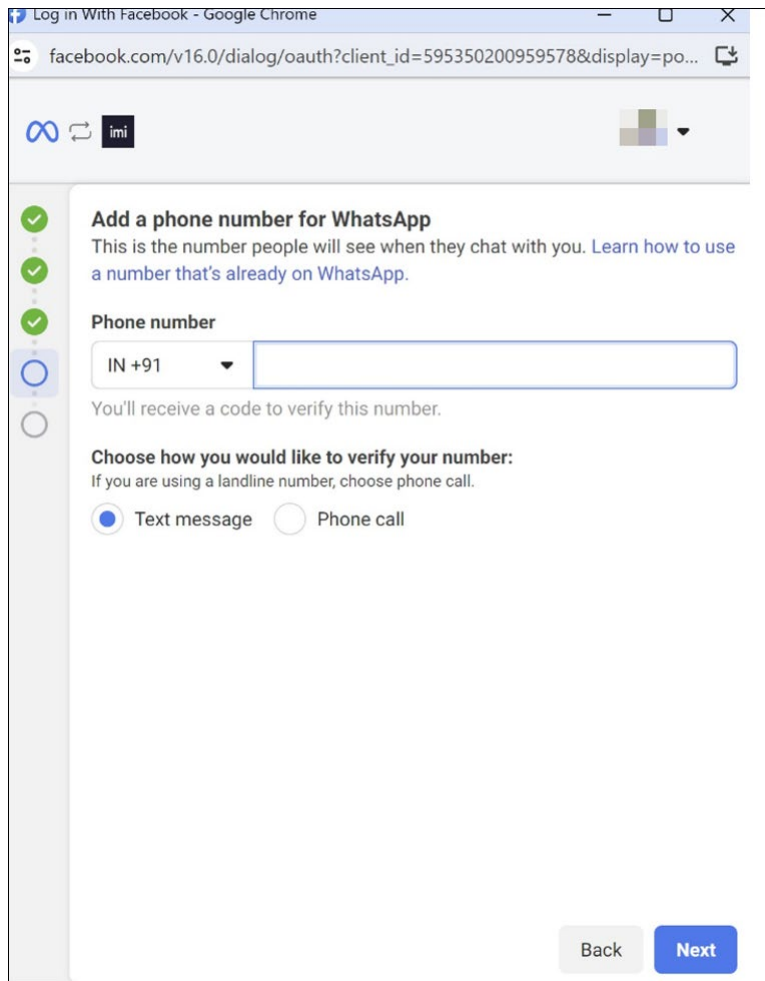


The screenshot shows a web browser window titled "Log in With Facebook - Google Chrome". The address bar contains the URL: facebook.com/v16.0/dialog/oauth?client_id=595350200959578&display=po... The page content is a form titled "Fill in your business information". Below the title, there is a sub-header "Business portfolio" with a dropdown menu showing "Webex CCE and Connect - Contact Center Demo". Below that is a "Business name" field with the text "Webex CCE and Connect - Contact Center Demo" and a character count "43/100". The next field is "Business website or profile page" with the URL "https://www.cisco.com/c/en/us/products/contact-center/webex-contact". Below that is a "Country" dropdown menu showing "India". At the bottom of the form, there is a button "+ Add Address (optional)". At the very bottom of the page, there is a link "imiconnect Canada's Privacy Policy and Terms", a "Back" button, and a "Next" button.

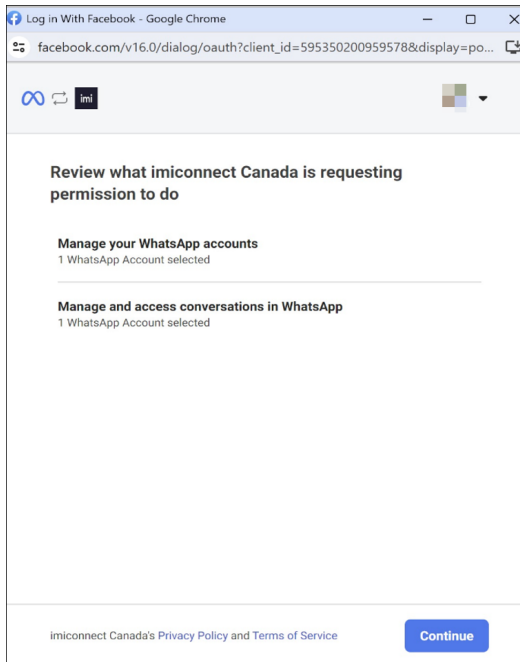
7. You can either create a new WhatsApp Business account or associate an existing account that you may have created outside of this workflow.



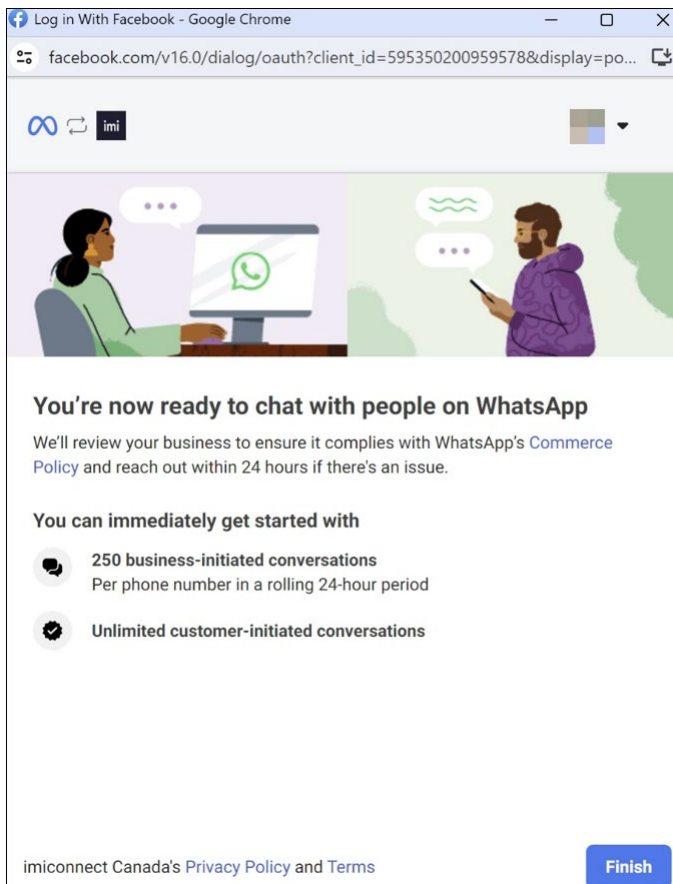
8. Provide the phone number that you intend to associate with the WhatsApp business account.



9. After verifying the phone number via the one-time password, you'll see a screen as shown below. Click **Continue**.

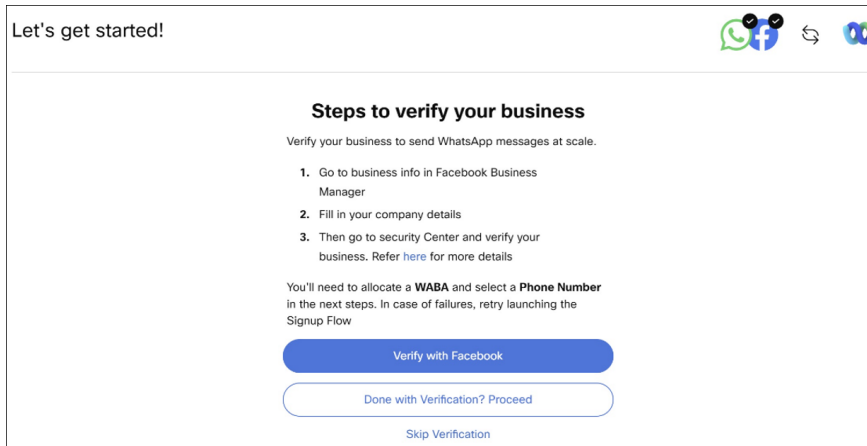


10. Click **Finish**. The WhatsApp account is created.

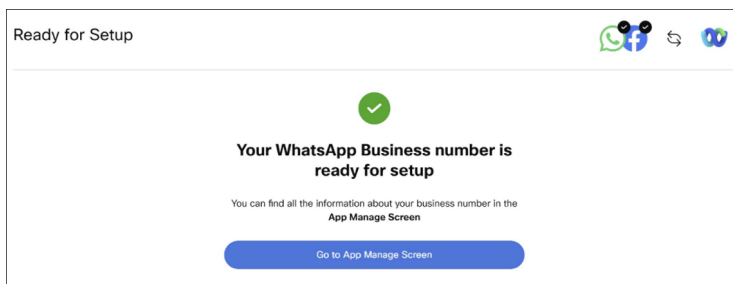
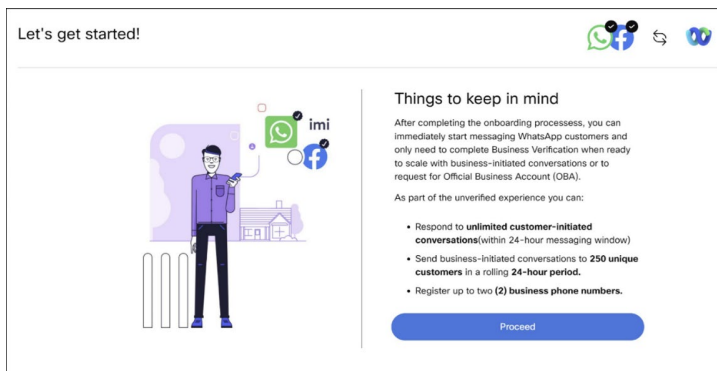


11. You'll get the option to verify the business.

12. Follow the on-screen instructions to complete this process. You may choose to skip this step and do it later. However, there are few restrictions imposed by WhatsApp until you verify your business. For a few test interactions or demos, this may not be necessary.



13. Once you skip the verification step, you can see the restrictions imposed on this account.



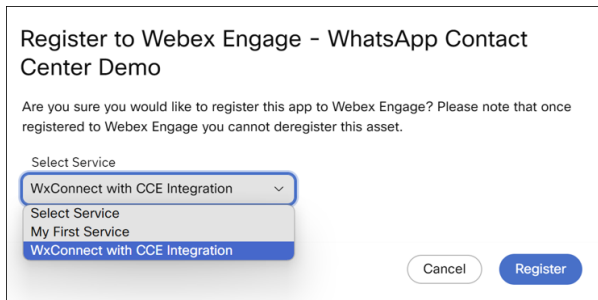
14. Once you've completed the workflow, you reach the app creation page again, where the created or associated WhatsApp Business account details are fetched in Webex Connect.

15. Click **Create** to save the asset. You can update the business information once the asset is saved which allows the end user to view the business information through WhatsApp on their devices.

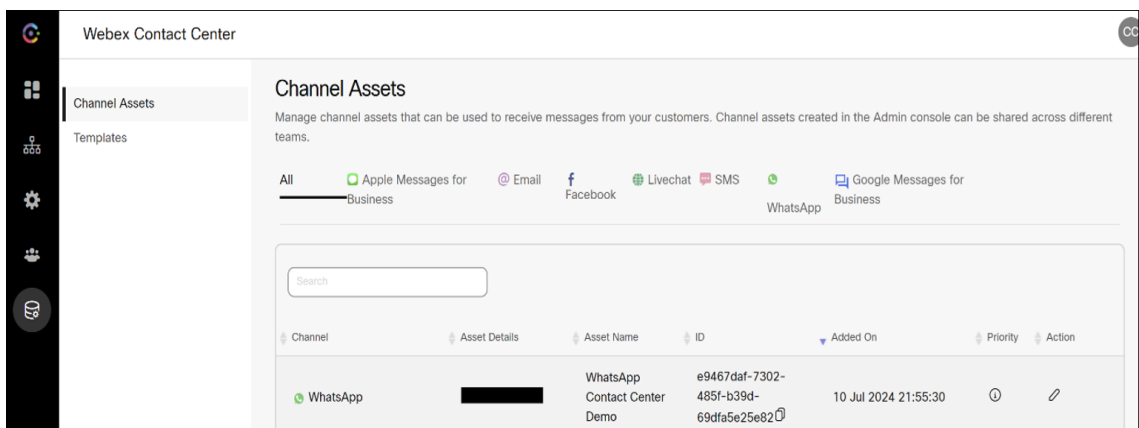
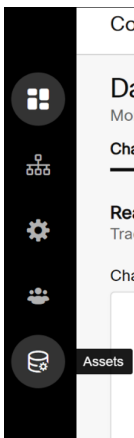
16. Click **Register To Webex Engage** that is enabled once the asset is saved.
17. Register the asset in Webex Engage, link the WhatsApp asset in the Engage platform, and invoke the Connect Flows.

Note:

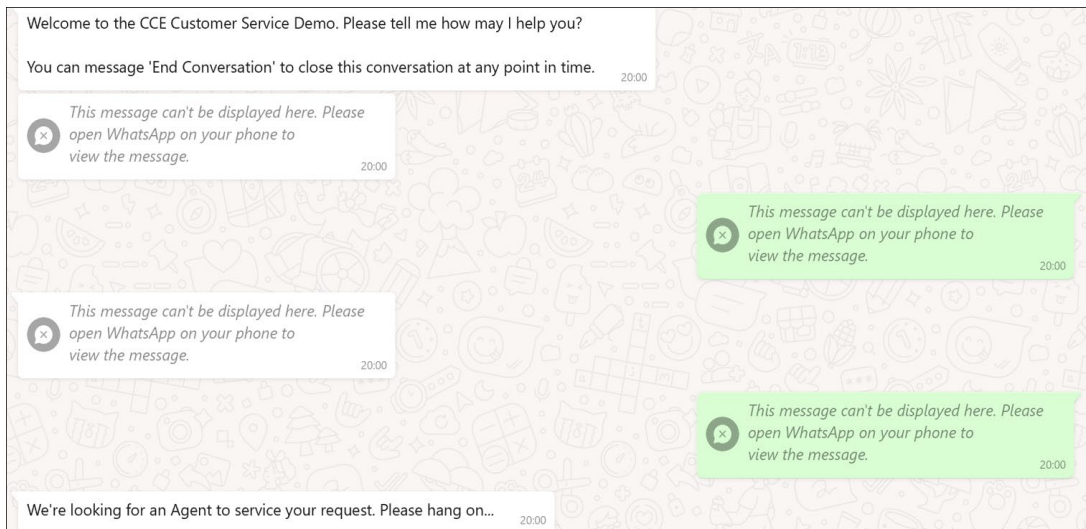
- Ensure that you select the right **Service** with the intended Webex Connect flows while registering the asset, as the Service Key of the Webex Connect service gets mapped or stored in Engage. You cannot change it later as the binding is important to send outbound leg messages from the Webex Connect flow either via the flow logic or through a Chat Bot, or when an agent replies to the customer.
- Ensure that you do not delete the service so that the asset is not orphaned in Engage.



18. Once registered, verify whether the asset is successfully registered in Webex Engage by launching the Engage administration console through Control Hub. If successful, you'll see the asset appear in the below tab:



19. You can send messages to the WhatsApp business number via the WhatsApp mobile application or the web browser version (<https://web.whatsapp.com/>). If you're using the WhatsApp desktop application, certain controls that you may send from the Webex Connect flows are not supported in the desktop version of WhatsApp.



Note: If you send a message to the business number integrated with Webex Connect, there will be no response back until the WhatsApp Inbound flow is set up in Webex Connect and the same is associated with the newly created WhatsApp asset.

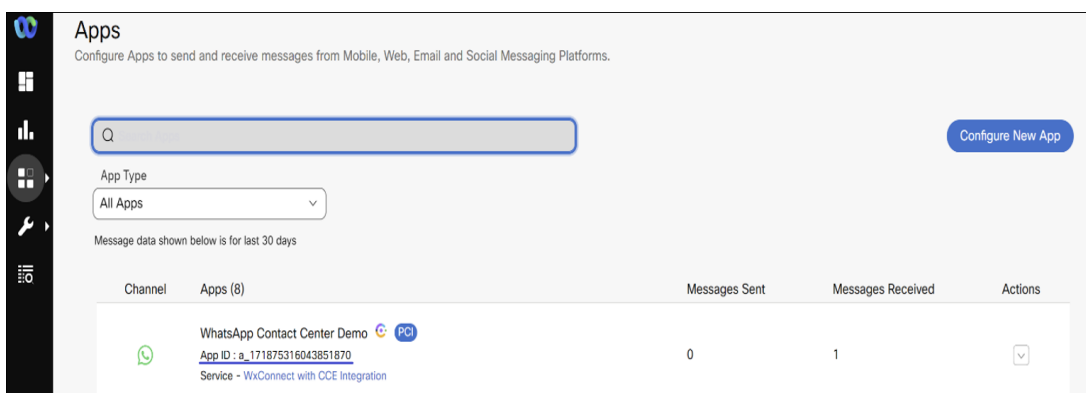
Linking WhatsApp Asset with WhatsApp Inbound Flow

The CCE Representative Flows bundle comprises a WhatsApp channel-specific flow namely **WhatsApp_Inbound_Flow.workflow**, to handle the conversations and messages sent to the WhatsApp Business number.

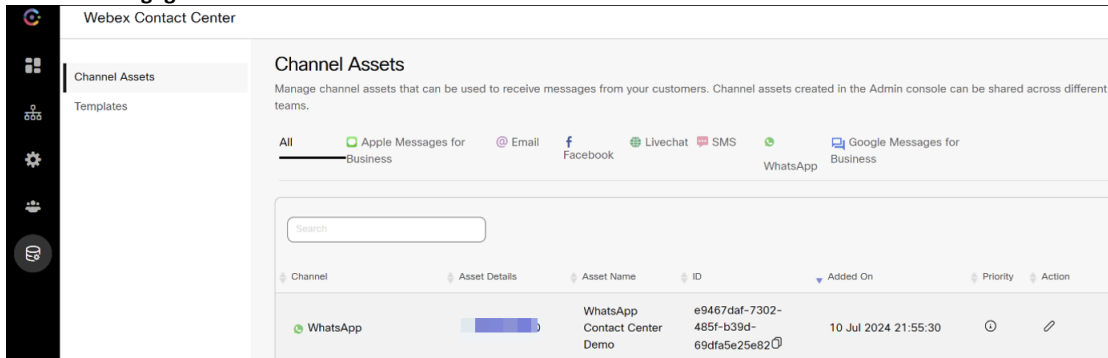
Once imported in Webex Connect, provide the WhatsApp Business number including country code without the plus sign in a custom variable **WANumber** in the Flow settings page for the Inbound flow. For example, "16414XXXXXX" without the double quotes.

Also, you can specify the App ID of the WhatsApp asset in the initial condition of the webhook event flows like **CREATED**, **QUEUED**, **ROUTED**, **CLOSED**, and **TRANSFERRED**, to trigger the flow specific to this asset. This step is essential to integrate multiple WhatsApp assets or business numbers in the same Webex Connect tenant. Here are the steps:

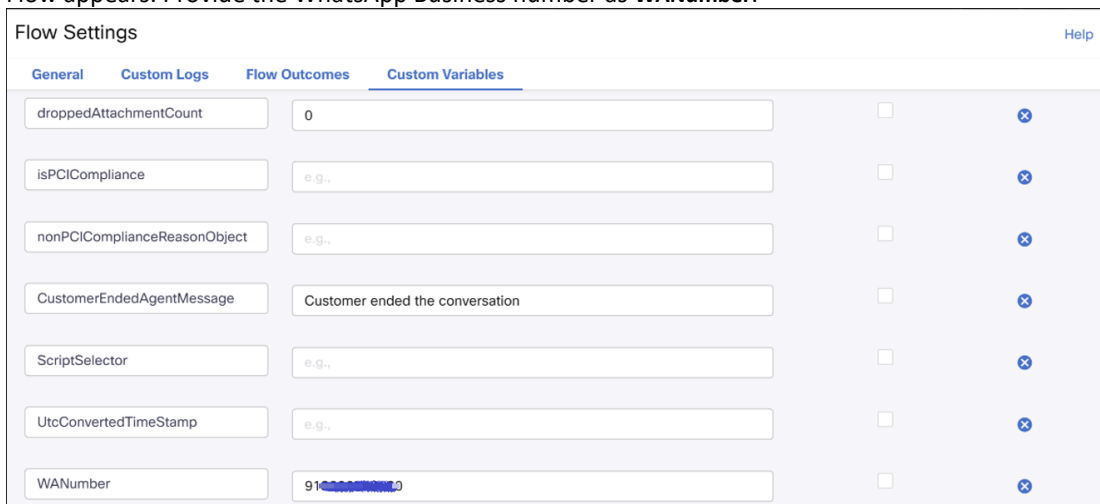
1. Note down or copy the Asset ID of the WhatsApp asset found under the **Apps** tab in Webex Connect.



- Note down or copy the WhatsApp Business number without spaces or the + sign from the **Asset Details** section in **Engage**.



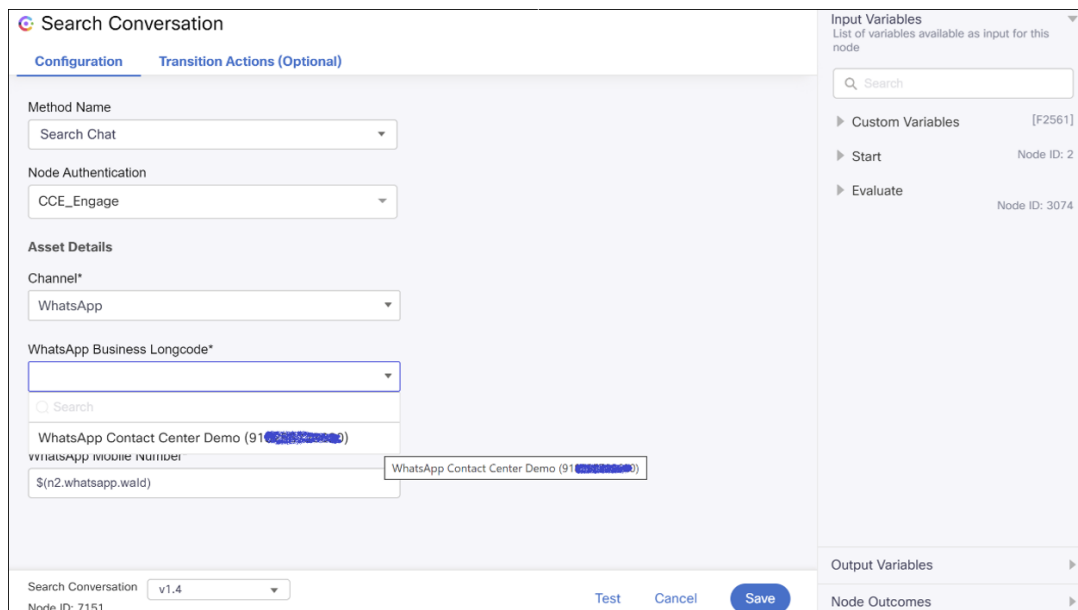
- Click the **Settings** icon on the top right corner. The **Flow Settings** window for the WhatsApp Inbound Flow appears. Provide the WhatsApp Business number as **WANumber**.



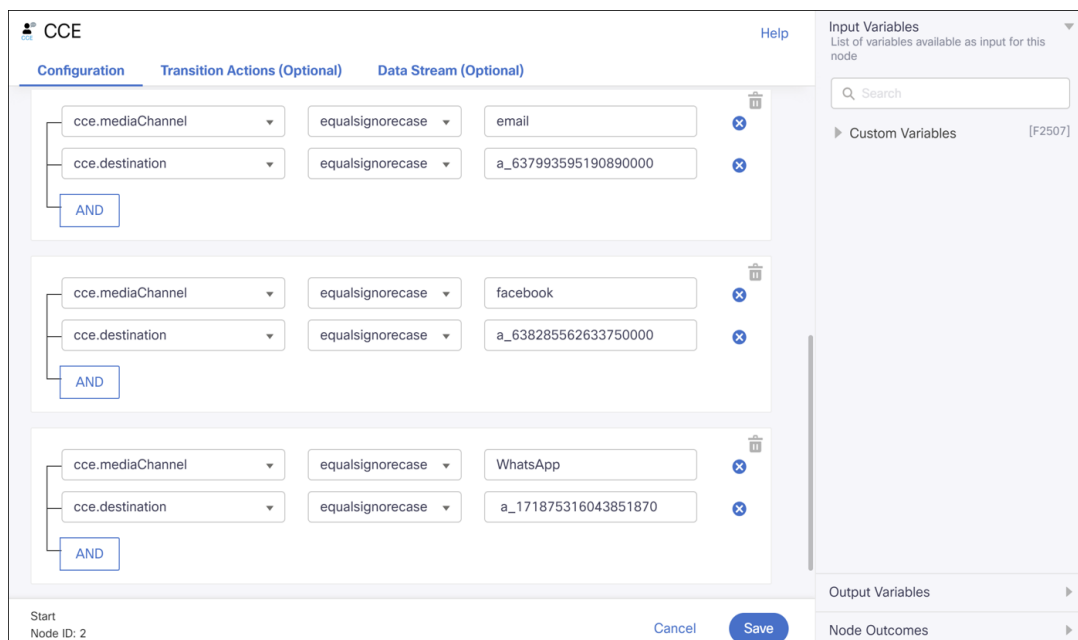
- Update the CCE Create Task and CCE End Task nodes to include the Fully Qualified Domain Name (FQDN) of the reverse proxy or load balancer front-ending the Cloud Connect nodes in the **Domain** field.

Note: Remove the **https** keyword and any forward or backward slashes while specifying the FQDN.

- Edit the **Search Conversation** node and select the WhatsApp asset from the drop-down, to ensure that the right conversation corresponding to the received message is fetched. You can decide whether to create a new conversation or append the message to an existing conversation accordingly.



6. If your asset is not found in the drop-down, verify whether the asset is registered with the Engage administration console or not. The asset appears for selection only if the asset is registered in the Engage administration console.
7. Open and save the receive nodes titled **Wait for Customer Response**, before being allowed to make the flow live.
8. Save the flow and make it live. You need to select the WhatsApp asset created in earlier steps when making the flow live.
9. Import the webhook event triggered flows for the events triggered by CCE or Cloud Connect and update the App_ID value of the WhatsApp app in the initial condition of the first CCE node. The **cce.destination** field must contain the value of the App_ID that was copied in Step 1.



You need to repeat this for all the CCE webhook event triggered flows for **CREATED, QUEUED, ROUTED, CLOSED** and **TRANSFERRED**.

10. Save the flow and make it live. You need to select the WhatsApp asset created in earlier steps when making the flow live.

Note: When a flow is made live, it gets bound to a specific WhatsApp asset for all the nodes referenced in the flow. Hence, the conditional execution of the webhook flow corresponding to the WhatsApp asset is important. You may repeat the step of importing the webhook event flows for another asset or WhatsApp Business number you want to configure in the system.

11. Alternatively, you may remove the conditional execution of the flow and keep a common one to then branch out within the flow itself based on the value contained in the **cce.destination** variable sent as part of the webhook event, to then invoke another flow using the Call Flow node.

This common webhook flow is devoid of any channel-specific node to send outbound notifications or messages to the customer and it's the new flow that contain the WhatsApp channel-specific nodes to send messages. In turn, the separate individual flows containing the WhatsApp nodes must be associated with the corresponding WhatsApp app because of the 1:1 relationship between a flow containing a channel-specific node and an asset.